

17 General Navigation Instructor Guide

Review Training Management Guide

Handouts

- ✓ Beginning
 - Name tents
 - Terminology
- ✓ General Navigation Training
 - ✓ Req Bid PO Status Slides
 - ✓ 17 General Navigation TTT Training Presentation – Print Version
 - ✓ 17 BidBuy Example General Req to Bid to PO
 - ✓ 17 BidBuy Example General Req to PO
- ✓ Post Training Distribution
 - ✓ 17 BidBuy General Navigation

Pre-Training Setup

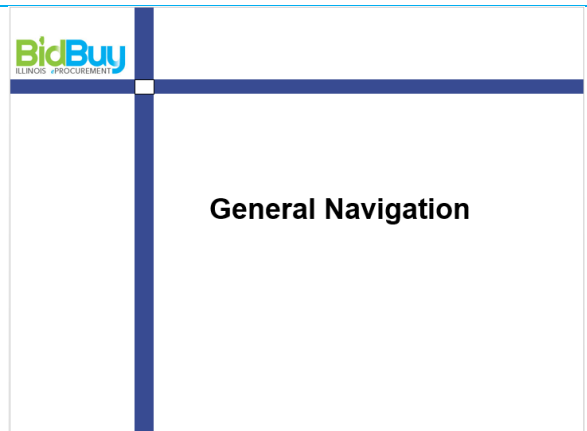
Document Type	Action
Practice	Practice Exercise: 17 BidBuy Example General Req to Bid To PO
Practice	Practice Exercise: 17 BidBuy Example General Req to PO
Purchase Order	Confirm a Purchase Order is available via Advanced Search for Description = Dogs
Bid	Hands-On - Create Bid documents, Send, add Vendor Quotes and have available in Ready to Open status for attendees to Open and Tabulate during the Training
Print Document	Print Presentation: 17 General Navigation TTT Training Presentation – Print Version
Print Document	Print Exercise: 17 BidBuy Example General Req to Bid To PO
Print Document	Print Exercise: 17 BidBuy Example General Req to PO

Timeline

Session I	10 min.	Introduction
	20 min	General Overview <ul style="list-style-type: none"> - User Roles - Document Structure - Terminology - General Process Workflows - BidBuy Organization Structure - State User Roles
	15 min.	BidBuy Functional Flow <ul style="list-style-type: none"> - Role Tabs - Header Bar - Navigation Bar - Control Center
	15 min	BidBuy Functional Flow Hands-On <ul style="list-style-type: none"> - My Account Maintenance - Advanced Search
	15 min	Break (say 10 min.)
	5 min.	Document Navigation Training <ul style="list-style-type: none"> - Document Type Review
	15 min.	Requisition Review
	15 min	Create Requisition Hands-on
Training for users only attending Silver Training will not complete the Bid and PO steps below.		
Session I or Session II	15 min	Bid Review
	15 min	Process & Publish Bid Hands-on
	10 min.	Bid Opening, Tabulation, Award Review
	10 min.	Bid Opening, Tabulation, Award Hands-On
	15 min.	Break (say 10 min.)
	10 min.	Purchase Order Processing Review
	10 min.	Purchase Order Processing Hands-On
	10 min.	Review & Closing
	20 min.	Exercise Req > Bid > PO (as time allows, exercise can be completed outside of Training)

Presentation - General Navigation


The BidBuy Training will begin with General Navigation. This will give attendees an opportunity to learn about general navigation, roles, and document creation. The State's procurement processes will be layered on in subsequent trainings after you have a fundamental understanding of BidBuy.



Objectives

After attending the General Navigation training, the attendees will have an understanding of :

- ✓ BidBuy Terminology
- ✓ The procurement workflow within BidBuy
- ✓ The user roles in BidBuy
- ✓ How to navigate within BidBuy
- ✓ How to create documents
 - Requisition,
 - Bid,
 - Purchase Order



Objectives


- ✓ Understand and use BidBuy Terminology
- ✓ Understand the procurement workflow within BidBuy
- ✓ Understand and explain user roles
- ✓ Understand and use the BidBuy homepage
- ✓ Understand BidBuy document types
- ✓ Create a Requisition
- ✓ Create a Bid (Publish, Open, Award)
- ✓ Create a Purchase Order and Send

General Overview

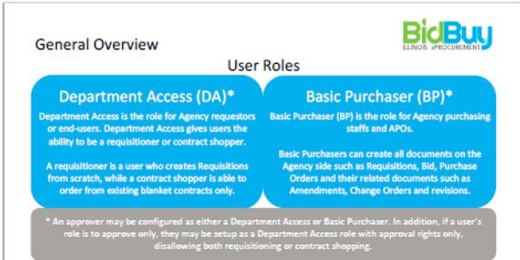
The **General Overview** handout will assist users throughout the training and during their use of BidBuy. The 2-page document provides an outline of the BidBuy system, terminology, and overall document flow. The following 4 slides gives the instructor an opportunity to review the document with the attendees.

User Roles (definitions)

- ✓ The State will be using 2 primary User Roles within BidBuy, Department Access and Basic Purchaser.
 - **Department Access (DA Users)** – Also known as 'requestors' within the system, users that define need through Requisition documents
 - **Basic Purchaser (BP Users)** – Users that process requests; have all rights of DA users and in addition can process Bid and Purchase Order documents
 - **Approvers** – Users with rights to approve documents within BidBuy. The approval role can be granted to



General Overview



users with the DA role. All users with the BP role have Approval rights.

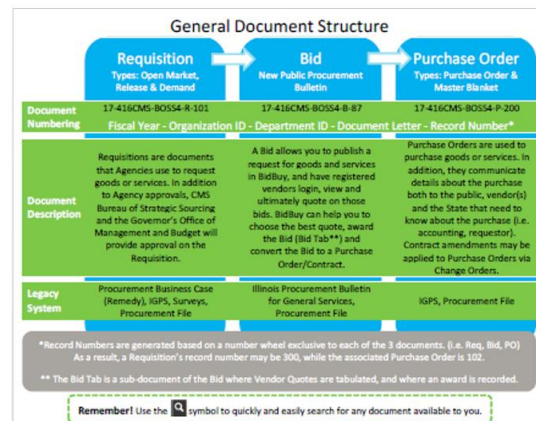
General Document Structure

The overall flow of documents in BidBuy is a Requisition defines the need, then is converted to a Bid, and then a Purchase Order. The Purchase Order is sent to the vendor, along with the contract.

- ✓ Requisition > Bid > PO

Documents within BidBuy will use a unique number 'wheel'. The numbers are unique from Requisition to Bid to PO.

- ✓ Requisition – identified with an R
- ✓ Bid – identified with a B
- ✓ Purchase Order – identified with a P
- ✓ The number wheel is unique; however, all documents do link within the system on the Items tab.

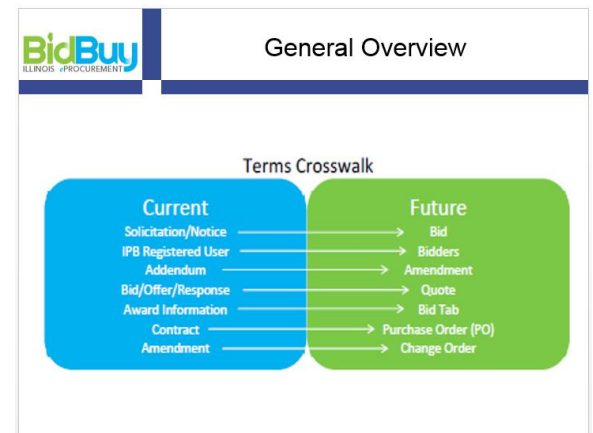


Terms Crosswalk

The Terms Crosswalk defines current State procurement terminology and the new terms in BidBuy.

- ✓ Cover each term defined on the crosswalk.

This Crosswalk will be an important area to reference throughout the training to assist attendees with the terminology change.

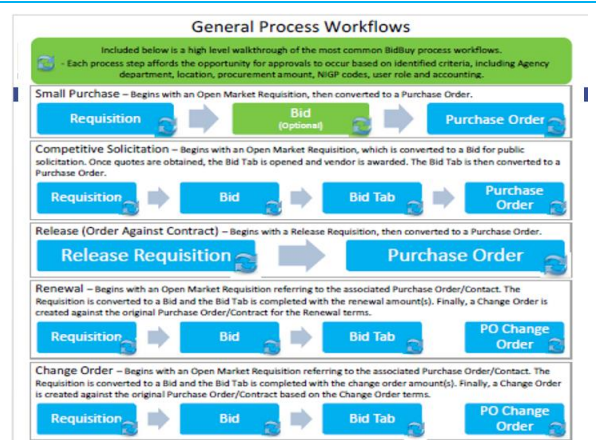


General Process Workflows

The General Process Workflows section defines the process of Req > Bid > PO by Procurement Type. The circular icon within each document type indicates an 'approval opportunity' within BidBuy.

Approval paths are configured by the BidBuy Administrators. Users can add additional approvers when submitting documents. In training there will only be a few approval paths configured for documents to enable processing of documents during each session.

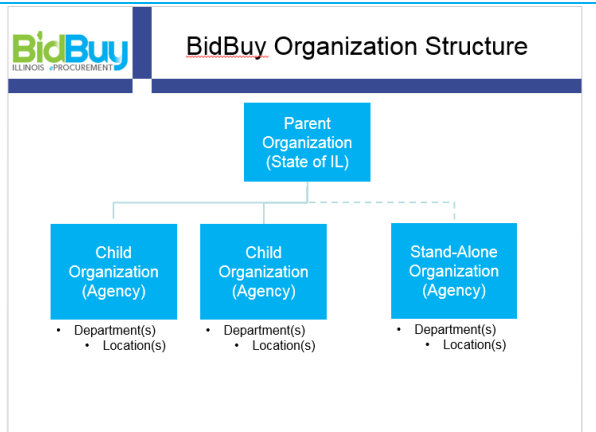
- ✓ The General Process Workflows are arranged by procurement type and includes required and optional documents for each process.
- ✓ Note Approval opportunities.



BidBuy Organization Structure

BidBuy has an Organizational Hierarchy. The State of Illinois is the 'Parent Organization'.

- ✓ Under the State of Illinois, each agency will be a 'Child Organization'.
 - Child Organizations will be used for agencies using ERP.
 - All other Organizations will be Stand-Alone Organizations.
 - The difference between Child and Stand-Alone Organizations is an administrative difference, users will have the same experience within BidBuy for each.
- ✓ Within the Organization (State agency) are Departments and Locations.
- ✓ During the configuration of BidBuy, the State's Administrators worked with each Agency to define their Organizational Structure.



State User Roles

BidBuy User Roles

Purchasing Roles

- ✓ Department Access – users making requests / defining need
- ✓ Basic Purchasing – users processing requests by creating Bids and Purchase Order
- ✓ Inquiry – a ‘view only’ role that users can view, but not process documents; typically used for system auditors

Administrative Roles

- ✓ **Internal and Organization Administrators** are responsible for configuring the system: user setup, approval path and overall system configuration.
- ✓ **Vendor Administrators** are responsible for Vendor configuration within BidBuy. Vendors are able to register directly in BidBuy and will work with your Vendor Administrators for assistance during the registration process.



State User Roles

- ✓ Purchasing
 - Department Access (DA)
 - Users requesting
 - Basic Purchasing (BP)
 - Users processing requests
 - Inquiry
 - View only
 - Approval
- ✓ Administrative
 - Internal Administrator, Organization Administrator
 - Vendor Administrator

BidBuy Functional Flow

The BidBuy **Home Screen** is divided into 4 sections:

- ✓ **Role tabs** at the top
 - A user with only 1 role will not see the role tabs. Users with multiple roles will select the appropriate role tab they wish to execute tasks.
- ✓ **Header Bar & Navigation Bar**
 - Header Bar is at the top and Navigation under it.
 - Allows movement within the application and provides links to important functions.
- ✓ **Control Center**
 - Area to access documents the user owns or can take action.
- ✓ Overall, BidBuy flows Left to Right in a tabular structure and Top to Bottom.
- ✓ All documents tabs have a Save on the bottom.
- ✓ All documents are submitted on the Summary tab.



BidBuy Functional Flow

- ✓ Functionality
 - Roles
 - Department Access, Basic Purchasing, Inquiry
 - Header & Navigation
 - Allows movement within the application and provides links to important functions
 - Control Center
 - All documents pertaining to you
- ✓ Screen information is designed to go:
 - Left to Right in a Tabular Structure
 - Top to Bottom
 - Submit on the bottom of the page

Roles

It is recommended to log into BidBuy to review the following slides while navigating within the BidBuy application.

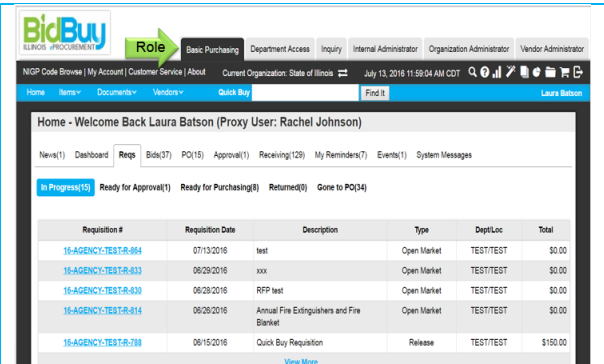
Roles – primary roles for the State

- ✓ Department Access (DA) - Users requesting
- ✓ Basic Purchasing (BP) - Users processing requests
- ✓ Inquiry - View only

Administrative Roles

- ✓ Internal Administrator
- ✓ Organization Administrator
- ✓ Vendor Administrator

Most people in the training class will have access to either Department Access or Basic Purchasing role in BidBuy production. Access will be granted upon completion of their training.



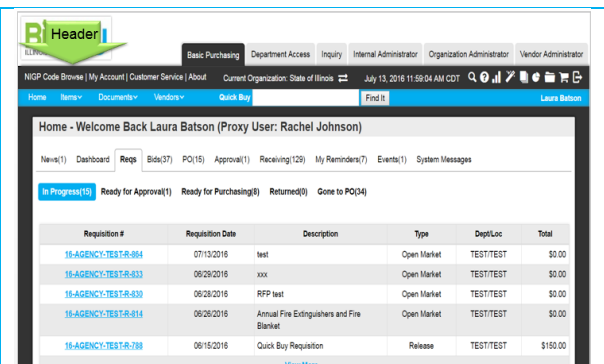
Header Bar

The Header Bar consists of the following links:

- ✓ **NIGP Code Browse** – Search for NIGP Codes based on Class, Class-Item, or Keywords
- ✓ **My Account** – Includes user profile information, edit My Account to update basic profile information
- ✓ **Customer Service** – Opens an email to contact the BidBuy Help Desk
- ✓ **About** – Software version
- ✓ **Advanced Search** – Enables search by document type based on a wide variety of criteria
- ✓ **Help** – application specific System Manual, a good tool to answer application specific questions - does not include State processes
- ✓ **G2B Punchout** – Access to vendor's catalogs for shopping and returning to BidBuy for approvals. Punchout catalogs are enabled working with vendors, so will be rolled out over time.
- ✓ **Exit** – Logout of BidBuy, for security it is very important to logout each time you walk away from your computer.
 - The system will timeout after 30 minutes of no activity.

The following may be available based on the user's rights within BidBuy:

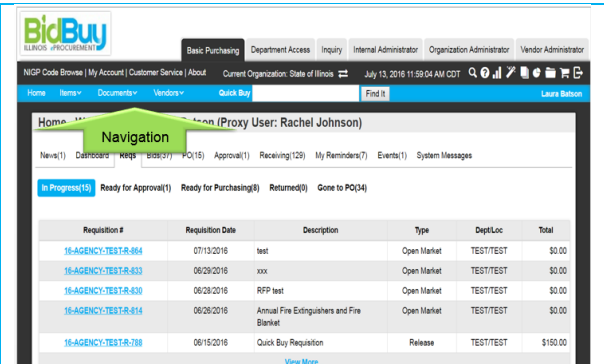
- ✓ **Administrative Reports** – BidBuy Reports available to users with rights to access
- ✓ **Ad Hoc Reports** – Adhoc reports enables users with rights to create custom reports based



Navigation Bar

The **Navigation Bar** consists of the following links:

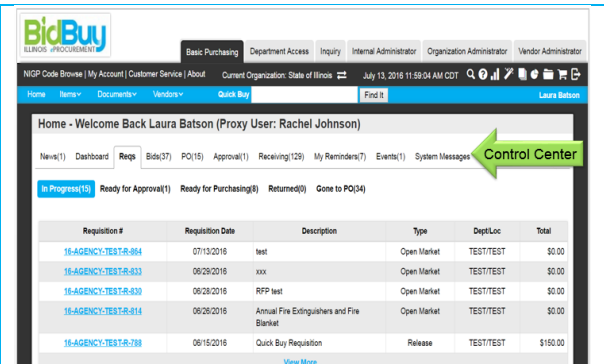
- ✓ **Home** – Returns the user back to their BidBuy Home page.
- ✓ **Items** – Search for items ordered within BidBuy by NIGP Code description.
- ✓ **Documents** – Dropdown menu to Navigation to: Requisitions, Bids, POs, and Quotes.
 - Requisition documents are created by selecting Documents > Requisitions > New
- ✓ **Vendors** – Search for Vendors registered in BidBuy.
- ✓ **Quick Buy** – Search for items available to order from Contracts (Master Blanket Purchase Orders), as well as returns like items that have been ordered in BidBuy.



Control Center

The **Control Center** lists documents owned by your user account, or available for your user account to take action. The Control Center is grouped by document type as the main tabs, and document status as the sub-tabs.

- ✓ On this screen you will find documents that requires your attention (approvals, etc.).
- ✓ News items are posted by your BidBuy Administrators and will include messages regarding your BuySpeed system (i.e.: 'servers will be down tonight.').
- ✓ My Reminders tab will show any documents that have reminders for you to take action on.
- ✓ Clicking on any document tab will allow you to navigate to documents based on current actionable status (sub tabs).
 - Note: Not all status are displayed for each document type. These are primarily statuses that documents have action available to the user.



Log Into BidBuy

We will login and update our account information. I will show you and then we can do it together.

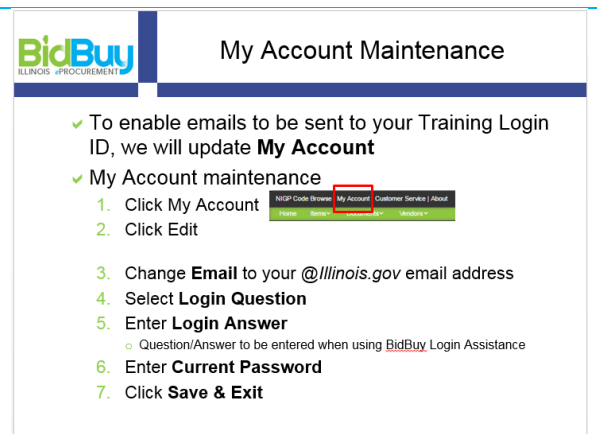
- ✓ The login process is the first step whenever a user is accessing BidBuy



My Account Maintenance

To enable attendees to receive email communications from BidBuy during the Training sessions, everyone will update their Email address.

- ✓ Update **My Account** information
 - Email – use your @illinois.gov email address
 - Challenge questions – Question/Answer to be entered when using BidBuy Login Assistance
 - Password – your password is required to be entered prior to submitting any changes in **My Account**

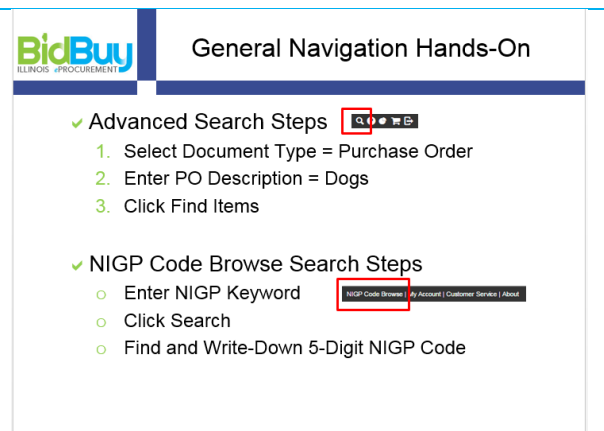


General Navigation Hands-On

We are going to use the Advanced Search. The Advanced Search will be used frequently to find documents within BidBuy, so it is important to be familiar with the functionality.

Advanced Search allows a search by document types. Within each document type there is a variety of criteria that could be used for searching.

- ✓ **Important Note:** When searching in BidBuy start with basic keywords and then expand the search based on results returned. BidBuy searches default to a wild-card on both sides of the text; therefore, a search for the keyword 'table' would return both 'wood table' and 'vegetable'.



Instructor Online - General Search and My Account Update

Modify My Account and use Advanced Search

- ✓ Demo Steps to change the user's My Account information and use Advanced Search

Instructor does the following and then turns over to user to do.

My Account

<p>Click on the Header Bar > My Account</p> <ul style="list-style-type: none"> ✓ Modify the following information: <ul style="list-style-type: none"> ○ Email – use your @illinois.gov email address ○ Challenge questions – Question/Answer to be entered when using BidBuy Login Assistance ○ Password – your password is required to be entered prior to submitting any changes in My Account 	<p>Click My Account</p> <ul style="list-style-type: none"> ✓ Email Address: Enter your @illinois.gov email address ✓ Select Login Question: Select question to be asked when using Login Assistance ✓ Select Login Answer: Enter response to challenge Question ✓ Password: enter current password
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Advanced Search

<p>Click on Header Bar > Advanced Search</p> <p>There are several fields to search; the default search criteria includes ALL of fields selected.</p>	<p>Click Advanced Search icon</p> <ul style="list-style-type: none"> ✓ Module: Purchasing Module ✓ Document Type: Purchase Order ✓ PO Description: Dog ✓ Click Find It, or select return key
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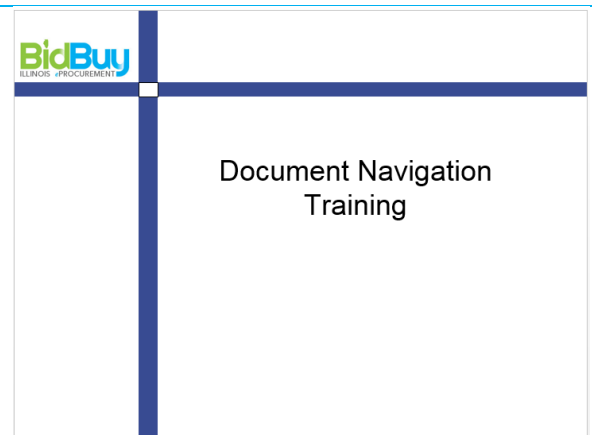
Hands-on Activity

- ✓ Attendees log into BidBuy and enter their @illinois.gov email address and then uses the Advanced Search icon to search for a Purchase Order with 'dog' in the Description field

Presentation - Document Navigation - Requisitions

Document Navigation Training

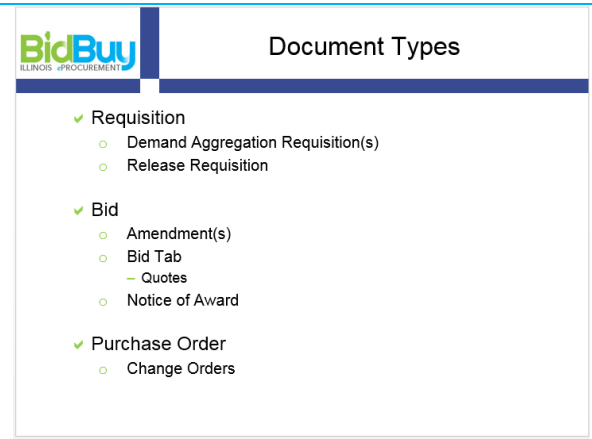
After completing the BidBuy general navigation, we will review BidBuy documents.



Document Types

The State is using three types of BidBuy documents:

- ✓ **Requisition** – determination of need
- ✓ **Bid** – vendor facing document for response and/or general notification
- ✓ **Purchase Order** – the agreement sent to the Vendor
- ✓ **PO Change Order** – required to modify the Purchase Order after it has been approved



What is a Requisition?

- ✓ A **Requisition** allows Agencies to place requests for good and/or services.
- ✓ There are multiple types of requisitions:
 - Open Market - A one-time request that is not currently on contract (Master Blanket PO) in BidBuy
 - Release – A request to order goods or services from a Master Blanket PO in BidBuy
 - Demand – A request to collect need across several agencies to be aggregated by CMS
- ✓ Requisition documents can be electronically converted to Bid or Purchase Order



Requisition Statuses

As Requisitions are processed, their status changes in order to allow/disallow various functions associated with the document. The table, also a handout, displays each status of a Requisition and what actions each status supports.

Status Highlights:

- ✓ **In Progress** – Allows a user to enter information and make any updates
- ✓ **Ready for Approval** – Only users with rights to approve can approve documents, the requestor cannot modify the document while in the approval process



Requisition Statuses

Status Code	Status Name	Meaning	Available Actions	Actions Permitted By
1RI	In Progress	The initial status of new documents. The document is still being completed by the creator.	<ul style="list-style-type: none"> Edit Submit for Approval Clone (creates a new copy of the document) Cancel 	<ul style="list-style-type: none"> Creator Authorized Superusers
1RRA	Ready for Approval	The document has been submitted for approval and is travelling down an approval path.	<ul style="list-style-type: none"> Approve/Disapprove Edit (accounting and commodity code information only) Clone Cancel 	<ul style="list-style-type: none"> Current approver
1RRP	Ready for Purchasing	The document has been approved and procurement must decide whether to conduct a solicitation (for off-contract Requisitions), purchase the items or disapprove the request.	<ul style="list-style-type: none"> Convert to Bid (for Open Markets) Convert to Purchase Order Disapprove Clone Cancel 	<ul style="list-style-type: none"> Basic Purchasing user
1RRT	Returned	The document was disapproved by an approver or Basic Purchasing user.	<ul style="list-style-type: none"> Reopen (returns document to "In Progress" status) Clone Cancel 	<ul style="list-style-type: none"> Creator Authorized Superusers
1RPO, 1RB	Gone to X	The document has been converted into a Purchase Order or Bid. The resulting Purchase Order or Bid must be processed.	<ul style="list-style-type: none"> Clone 	<ul style="list-style-type: none"> Any DA or BP user
1RC	Cancelled	The document has been cancelled.	<ul style="list-style-type: none"> Clone 	<ul style="list-style-type: none"> Any DA or BP user

Create Open Market Requisition

We will begin by creating an Open Market Requisition. During the training, users can request anything they would like. This exercise is to have fun and learn the basic functionality of BidBuy Requisition documents.



Create Open Market Requisition

Step 1: Click Documents > Requisitions > New

Step 2: Complete Tabs

Step 3: Submit Requisition for Approval

Instructor Online - Create Requisition

Create Requisition

- ✓ Demo steps for creating an Open Market Requisition

Instructor does the following and then turns over to user to do.

New Requisition

<p>Initiate a new Requisition document.</p> <p>On the Navigation Bar:</p> <ul style="list-style-type: none"> ✓ Click Documents ✓ Hover over Requisitions ✓ Select New <p>The following sections guide the instructor tab by tab through the Requisition document.</p>	<ul style="list-style-type: none"> ✓ Documents > Requisitions > New
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General Tab

<ul style="list-style-type: none"> ✓ On whose behalf are we requesting this product or service? ✓ General tab must be completed first. ✓ Short Description – Specific and precise description ✓ Department/Location – Defaults to the user creating the document's default, can be modified ✓ Type Code – Select the best choice based on what is being requested 	<ul style="list-style-type: none"> ✓ Short Description: Specific and precise description ✓ Department: Default ✓ Location: Default ✓ Requisition Type: Open Market ✓ Type Code: Commodities
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Items Tab

<p>Enter items into the requisition Add Open Market Items</p> <ul style="list-style-type: none"> ✓ Description – add detailed description, up to 4,000 characters allowed ✓ Quantity – quantity required ✓ Cost – estimated cost ✓ UOM – Select appropriate for item being requested ✓ NIGP Class and NIGP Class Item – add by using lookup (magnifier), dropdown, or key in value ✓ Additional NIGP Codes – additional NIGP codes can be added ✓ Select Save & Exit when complete with Item updates 	<p>Add Open Market Item:</p> <ul style="list-style-type: none"> ○ Description: ○ Quantity: ○ Unit Cost: ○ UOM: ○ NIGP Class Code: ○ NIGP Class Item:
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Vendor Tab

Typically we will leave this tab blank for the Basic Purchasing user	✓ No Action required, briefly explain
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to select vendors based on NIGP Code on the Bid.	
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Address Tab

The Requisition Address is auto filled by the default for the user's setting on Ship-to Address and Bill to Address . This can be modified to addresses the user is authorized to ship-to by selecting the dropdown.	<ul style="list-style-type: none"> ✓ Address: Use Default
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Accounting Tab

<p>This is accounting information for all items for the Req. We are selecting the main Accounting Tab. To add unique account codes for individual items, go to Items tab and select Accounting sub-tab.</p> <p>Stress importance of selecting Save Based on Percentages and then Rebuild for All Items after an Account Code is added to the document</p> <p>Save by Dollars -to manually fill in the dollar amount entered; percentage will be calculated automatically</p> <p>Save by Percentages - will automatically fill in the correct dollar amounts based on the percent entered (We will use this one for now)</p> <p>Rebuild for all Items - this applies the accounting to the item or items we added. Until we do this, accounting is not applied</p>	<p>Account Code:</p> <ul style="list-style-type: none"> ✓ Click the magnifier next to Account Code box ✓ Lookup Account screen opens, select Find It ✓ Select Account Code ✓ Select Save Based on Percentages ✓ Select Rebuild for All Items
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Routing Tab

<p>The routing that a requisition must follow for approval is determined by the applicable approval paths. The approval path for the requisition is displayed on the Routing Tab.</p> <p>This tab remains blank until an approval path is determined when the requisition is submitted for approval.</p>	<ul style="list-style-type: none"> ✓ No Action, briefly explain 	
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Attachments Tab

<p>Attaching files to BidBuy documents is a useful way to include specifications or other guidelines in the user's procurement documents.</p> <ul style="list-style-type: none"> ✓ Files are selected from the user's computer file directory ✓ Forms are created by a BidBuy Administrator that can be added to the document and modified within BidBuy 	<ul style="list-style-type: none"> ✓ Add a file from the computer directory (can be a picture) to demonstrate how to add an attachment.
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Notes Tab

The Notes tab allows the user to add notes to provide additional	<ul style="list-style-type: none"> ✓ Write a brief demo note to show the function...
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information or special instructions for internal users. A note is similar to a post it note as an internal communication.

Only the user creating a note may edit their note.

Reminders Tab

Reminders are a useful function of the application to send to a specific State user of BidBuy on a specific date.

Reminders are sent via email (if option selected and display on the user's Reminders Tab

- ✓ Due Date: Today
- ✓ Comment: Remember to review document
- ✓ Remind Whom: Your training user
- ✓ Days Prior: 0
- ✓ Send email: Check box
- ✓ Save & Continue

Summary Tab

The Summary tab allows the user to review the Requisition for revisions and updates prior to approving. The user can return back to a specific tab to update.

Automatic Approval = approval paths are not configured in BidBuy Train, so user will automatically approve their document.

- ✓ Review Summary Tab
- ✓ Adjust on correct Tab as needed
- ✓ Submit for Approval
- ✓ Choose Automatic approval option
- ✓ Requisition status 'Ready for Purchasing'

Hands-on Activity

- ✓ Attendees create an Open Market Requisition using hand-out (17 BidBuy Example General Req to Bid to PO)
- ✓ Presenter to have the **Create Open Market Requisition** slide on the overhead and walk around to assist

*When complete check time for a break

If you are training users that will only be attending Silver Training this will be the end of the presentation and example. Navigate to *Presentation – Review* section to review and allow attendees to create another practice Requisition.

Presentation - Create Bid

What is a Bid?

- ✓ A Bid allows a user to publish requests for goods and services within BidBuy.
- ✓ Publishes general notices within BidBuy.
- ✓ Unrestricted Bids are searchable by public users.



What is a Bid?

- ✓ Replaces the Illinois Procurement Bulletin
- ✓ Publishes requests for goods and services in BidBuy
- ✓ Publishes general notices in BidBuy
- ✓ Types of Bids
 - Open Market
 - Blanket

Bid Statuses

As Bids are processed, their status changes in order to allow/disallow various functions associated with the document. The table, also a handout, displays each possible status of a Bid and what actions each status supports.

Status Highlights:

- ✓ **In Progress** – Allows a user to enter information and make any updates
- ✓ **Sent** – Bid available online for vendors to review and respond as applicable



Bid Statuses

Status Code	Status Name	Description
2BI	In Progress	The document is still being completed by the originator. It is still editable by the originator and any Basic Purchaser rights.
2BRA	Ready for Approval	The document has been submitted and travelling down the approval path. Basic Purchasing users can edit only the Bidders tab at this status.
2BRT	Returned	The document was returned to the originator by an approver prior to being published. The Bid can be "Re-Opened" to "In Progress" status, edited and re-routed for approval by the originator.
2BR	Ready to Send	The document has been approved and is awaiting the originator to send notification about the Bid to selected vendors and post on the BidBuy login screen (if desired). The document can only be edited via an Amendment.
2BS	Sent	Notification regarding the Bid has been sent to selected vendors and posted on the BidBuy login screen (if desired). Vendors are now able to submit electronic responses (if allowed). The document can only be edited via an Amendment.
	Ready to Open	The Bid has reached its configured Opening date and time. Vendors can no longer submit electronic responses. The document can only be edited via an Amendment.
2BO	Opened	The vendor responses to the Bid can now be viewed. The evaluation process occurs on the Bid Tab at this status.
2BE	Evaluated	All Bid items have been recommended for award by the Basic Purchaser and are now awaiting approval.
2BA	Approved	The award recommendation of all Bid items has been approved. These items are now waiting for the Basic Purchaser to convert them into one or more Purchase Orders.
2BPO	Bid to PO	All Bid items have been awarded and transferred to a Purchase Order. Participating Vendors can now see the Bid Tab and any attachments on it.
2BC	Cancelled	The Bid has been cancelled by the originator or an approver.

Process and Publish Bid

Bids are processed in two phases:

- ✓ Process & Publish
- ✓ Open, Tabulate, and Award

The demo will begin with processing and publishing a Bid for the Requisition created in the previous section.



Process & Publish Bid

Login & Select Basic Purchasing Role

Step 1: Convert Requisition to Bid

Step 2: Add missing information

Step 3: Review and update Tabs

Step 4: Submit bid for approval and Send Bid

Instructor Online - Process Bid

Process Bid (Basic Purchaser Role)

- ✓ Demo steps for creating and processing Bid

Instructor does the following and then turns over to user to do.

Requisition Summary Tab

<p>The Requisition now will be in the Basic Purchasing user's Ready for Purchasing queue on the Control Center.</p> <p>Upon opening the Requisition, the Basic Purchasing user should review the Summary tab. If the Requisition needs to go back to the originator for review, the BP user can Disapprove. If everything looks good, the BP user will convert to Bid.</p> <ul style="list-style-type: none"> ✓ Navigate back to Requisition as a Basic Purchasing user ✓ Convert to Bid <ul style="list-style-type: none"> ○ Point out the BidBuy message confirming the user intends to convert to Bid. This is an important warning for users to always read and confirm intended action. 	<ul style="list-style-type: none"> ✓ Navigate to Requisition (Advanced Search or Control Center > Reqs > Ready for Purchasing) ✓ Open Requisition and review Summary tab ✓ Select Convert to Bid ✓ Click OK <p>The new Bid number will display on Requisition Summary tab.</p> <ul style="list-style-type: none"> ✓ Click the Bid number to open and process.
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General Tab

<p>The Bid will open to the Summary Tab. Click General Tab and work your way through the Bid tabs.</p> <p>The Bid document populates with information from the Requisition but there are some required fields that were not available for a requisition. The required fields will be displayed in Red.</p> <p>While the Bid is an In-Progress status all fields can be edited. The approved Requisition will stay as-is and can be navigated to from the Bids > Items tab for review/audit purposes.</p> <p>Review and update the General tab. The following are required when processing a Bid:</p> <ul style="list-style-type: none"> ✓ Type Code – Select based on the type of procurement ✓ Bid Available Date – Date bid is made available to the public to view and respond ✓ Bid Opening Date – Date vendor quotes are due ✓ SPO Name ✓ Is this a Small Business Set Aside? 	<ul style="list-style-type: none"> ✓ Type Code: 10 – Invitation for Bid (IFB) ✓ Bid Available Date: Now ✓ Bid Opening Date: Tomorrow at 6:00am ✓ Purchase Method: Open Market ✓ SPO Name: Jane Doe ✓ Is this subject to Small Business Set-Aside? : No
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Items Tab

The Items tab was carried over from the Requisition. The Basic Purchasing user will review and update as needed.	✓ No action, review only
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Address Tab

The Ship-to Address and Bill to Address are carried over from the Requisition document.	✓ No action, review only
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Accounting Tab

Carried over from the Requisition.	✓ No action, review only
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Routing Tab

<p>The routing that a Bid must follow for approval is determined by the applicable approval paths.</p> <p>This tab remains blank until an approval path is determined when the Bid is submitted for approval.</p>	✓ No action, briefly explain
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Bidders Tab

<p>The Bidders tab allows the Basic Purchasing user to look up and add vendors to receive notifications about the Bids. The user will also select whether the Bid is available to the general public to view and respond.</p> <ul style="list-style-type: none"> ✓ Unrestricted bid – available to the general public from the BidBuy login page, Open Bids section ✓ Restricted bid – only available to vendors on the Bidders tab for view and response 	<ul style="list-style-type: none"> ✓ Lookup & Add Vendors ✓ Search Vendor Name: Train ✓ Select: Train Vendor 1 ✓ Select Unrestricted bid, all vendors can view and respond
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Questions Tab

<p>The Questions tab allows the user to create specific questions for the vendor to answer with a supplied response type. The Questions become part of the Vendor's response to the Bid.</p> <p>Sample question types may be about specifications or delivery.</p>	✓ Add Question as Yes/No response: Are we registered through Illinois Procurement Gateway?
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Attachments Tab

<p>Attachments are carried over from the Requisition. Attachments can be deleted or added on the Bid.</p> <p>After adding an Attachment, the BP user will need to determine whether 'Show to Vendor' should be selected.</p> <ul style="list-style-type: none"> ✓ Show Vendor – selecting will show the vendor the 	✓ No action, review only
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attachment when they review the Bid	
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Notes Tab

<p>The Notes tab allows the user to add notes to provide additional information or special instructions for internal users. A note is similar to a post it note as an internal communication.</p> <p>Only the user creating a note <u>may edit</u> their note.</p>	<p>✓ No action, review only</p>
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Amendments Tab

<p>Amendments can be created after the Bid is in Sent status. They are used to amend the bid.</p>	<p>✓ No action, briefly explain</p>
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Q&A Tab

<p>The Q&A tab enables vendors to ask questions of the State about the Bid. The State will not use the Q&A tab to respond to questions, rather they will post all responses to vendor's Q&A as an Amendment.</p>	<p>✓ No action, briefly explain</p>
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Reminders Tab

<p>Reminders are a useful function of the application to send to a specific State user of BidBuy on a specific date.</p> <p>Reminders are specific to the document; therefore, reminders from the Requisition were not carried over to the Bid.</p>	<p>✓ No action, review only</p>
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Summary Tab

<p>The Summary tab allows the user to review the Bid for revisions and updates prior to approval.</p> <ul style="list-style-type: none"> ✓ Review information from all Tabs. ✓ Return to a Tab to update information and Save ✓ Submit for Approval <p>After a Bid has been approved, the BP user must access the Bid and select 'Send'.</p> <p>After the bid has been Sent and the Bid Available Date is current date or prior, vendors can view online.</p>	<ul style="list-style-type: none"> ✓ Review Summary tab ✓ Submit for Approval ✓ Select Automatic Approval <p>Bid status is now 'Ready to Send'</p> <ul style="list-style-type: none"> ✓ Select Send Bid to generate an email to Vendors on the Bidders tab and publish online <p>Bid status is now 'Sent'</p> <ul style="list-style-type: none"> ✓ Navigate to the BidBuy login page and view Open Bids to see the bid available to the public
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Hands-on Activity

- ✓ Attendees convert the Requisition created in previous step to a Bid
- ✓ Presenter to have the **Process & Publish Bid** slide on the overhead and walk around to assist


When complete, if time is available, take a break so the instructor(s) can log into BidBuy as a Vendor and create a Quote for each Bid. As an alternative, prepare documents in advance, see **Instructor Online – Open Bid, Tabulate and Recommend Award** section.

Presentation - Opening a Bid

Opening a Bid

After the bid has been published, the Basic Purchasing user will Open, Tabulate, and recommend Award.

- ✓ The Bid is not available to be Opened until after the Bid Opening Date
- ✓ After the Bid is Open, the BP user will tabulate and award



Opening a Bid

Login & Select Basic Purchasing Role

1. Go to Bid > Ready to Open
2. Select Your Bid
3. Bid Summary Tab: Select Open Bid
4. Bid Summary Tab: Select Bid Tab

Step 1: Tabulate Bid

1. Bid Tab: Items tab = Award by item
2. Bid Tab: Review other tabs and update

Step 2: Submit for Approval, Award, & Publish

1. Bid Tab: Summary tab = Submit for Approval

Instructor Online - Bid Open, Tabulate, and Recommend Award

Open Bid, Tabulate, and Recommend Award (Basic Purchaser Role)

- ✓ Demo steps for Opening Bid, Tabulating Bid, and Recommending Award

Recommendation: Create Bids prior to class and have in a 'Ready to Open' status for attendees to Open, Tabulate and Award. The instructor should have logged into BidBuy as two different vendors and submitted quotes electronically. This exercise can be done quickly by using the Clone feature on the Bid Summary tab.

Instructor does the following and then turns over to user to do

Navigate to Bid

Navigate to your Bid document. If the Bid Opening Date/Time has passed, the document will be 'Ready to Open'.

- ✓ Use Document Navigation for Ready to Open
- ✓ Advanced Search –Using Bid Number

Navigate to Bid:

- ✓ Bids tab > Ready to Open, or
- ✓ Documents > Bids > Ready to Open, or
- ✓ Advanced Search

Select Bid number to open

Summary Tab

<p>Select the Summary tab</p> <p>At the bottom of the Summary tab:</p> <ul style="list-style-type: none"> ✓ Select Open Bid ✓ Then select Bid Tab <p>The Bid Tabulation process enables review of vendor quotes entered into BidBuy. The Basic Purchasing user can also enter quotes on behalf of vendors that submitted paper copies after the Bid Opening Date.</p>	<ul style="list-style-type: none"> ✓ Summary tab – Select Open Bid ✓ Summary tab – Select Bid Tab
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Bid Tab: Quotes

Click Quote number to review each Quote and its Tabs	<ul style="list-style-type: none"> ✓ Review Vendor Quotes ✓ Select Quote # open and view Quote specifics
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Bid Tabulation: Revisions - Not Currently Used By the State

Bid Tab: Items

<p>The Items tab shows side-by-side pricing by item for all quotes.</p> <p>BidBuy identifies the lowest quote price with two asterisks (**). Use this feature with caution; users must review all quote information prior to making a determination.</p> <p>The user can select :</p> <ul style="list-style-type: none"> ✓ Award by Item – select to award by Item; if allowed, the items awarded can be to different vendors ✓ Award All – select to award all Items to a single vendor 	<ul style="list-style-type: none"> ✓ Select Vendor's Item to Award
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Bid Tab: Header Questions

Vendor responses to the Questions added to the Bid document.	<ul style="list-style-type: none"> ✓ Review vendor responses
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Bid Tab: Subcontractor Tab

Only applicable if Subcontracts are made available on the Bid prior to publishing or via an Amendment.	<ul style="list-style-type: none"> ✓ No action, briefly explain
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Bid Tab: Routing Tab

<p>The routing that a Bid Tabulation must follow for approval is determined by the applicable approval paths.</p> <p>This tab remains blank until an approval path is determined</p>	<ul style="list-style-type: none"> ✓ No action, review only
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when the bid tab is submitted for approval.	
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Bid Tab: Attachments Tab

Attachments can be added during the Bid Tabulation process.	✓ No action, review only
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Bid Tab: Score - Not Currently Used By the State

Bid Tab: Summary Tab

<p>The Summary tab allows the user to review the Bid Tab for revisions and updates prior to approving. The user can return back to a specific tab to update.</p> <p>Automatic Approval = approval paths are not configured in BidBuy Train, so user will automatically approve their document.</p> <p>Important: Upon final approval of the Bid Tab, an email is auto-generated from the system notifying vendors on the Bidders tab of the intent to award.</p>	<ul style="list-style-type: none"> ✓ Review Summary tab ✓ Confirm Vendor(s) and Item(s) selected ✓ Submit for Approval ✓ Automatic Approval
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Presentation - Process Purchase Order

What is a Purchase Order?

Purchase Order documents in BidBuy are the mechanism to communicate any agreement with a vendor to provide products/services.

- ✓ It is the contract
- ✓ Used to purchase goods and services
- ✓ State of Illinois types of POs
 - Open market
 - Term Contracts (Master Blanket)
 - Against a Term Contract (Release)



What is a Purchase Order?

- ✓ Used to purchase goods or services
- ✓ Allows Agencies to communicate purchase details to the public, vendor(s) and the State
- ✓ Allows Contract amendments to be applied to Purchase Orders via Change Orders
- ✓ Types of Purchase Orders:
 - One-time purchase (Open Market PO)
 - Term contract (Master Blanket PO)
 - Order against a term contract (Release)

Purchase Order Statuses

As POs are processed, their status changes in order to allow/disallow various functions associated with the document. The table, also a handout, displays each status of a PO and what status each status supports.

Status Highlights:

- ✓ **In Progress** – Allows a user to enter information and make any updates
- ✓ **Sent** – The vendor is able to log into BidBuy and view the PO online. If selected, the vendor will also receive an email notifying them the PO is available.



Purchase Order Statuses

Status Code	Status Name	Meaning	Available Actions	Actions Permitted By
3PI	In Progress	The initial status of new documents. The document is still being completed by the creator.	<ul style="list-style-type: none"> • Edit • Submit for Approval • Clone (creates a new copy of the document) • Cancel 	• All BP users
3PRA	Ready for Approval	The document has been submitted for approval and is travelling down an approval path.	<ul style="list-style-type: none"> • Approval/Disapproval • Edit (accounting and commodity code information only) • Clone • Cancel 	• Current approver
3PRT	Returned	The document was disapproved by an approver.	<ul style="list-style-type: none"> • Reopen (returns document to "In Progress" status) • Clone • Cancel 	• All BP users
3PRS	Ready to Send	The document has been approved and is ready to be sent to a vendor or vendors.	<ul style="list-style-type: none"> • Change Order • Send to Vendor • Clone • Cancel 	<ul style="list-style-type: none"> • All BP users • DA users (only their own Direct Releases)
3PS	Sent	The document has been sent to the vendor. Vendors can view online.	<ul style="list-style-type: none"> • Change Order • Cancel • Clone 	• All BP users
3PC	Cancelled	The document has been cancelled.	<ul style="list-style-type: none"> • Clone 	• All BP users

Process Purchase Order

The Purchase Order is created from the Bid Tab Summary tab. It is important to point this out to attendees as users often try to find the option to convert on the Bid Summary tab.



Process Purchase Order

Login & Select Basic Purchasing Role

1. Go to Bid > Opened
2. Select **Your Bid**
3. Bid Summary Tab: Select Bid Tab
4. Bid Tabulation Summary Tab: Select Create PO

Step 1: Add missing information

Step 2: Review and update other Tabs

Step 3: Submit PO for approval and Send

Instructor Online - Process Purchase Order

Process Bid (Basic Purchaser Role)

- ✓ Demo steps for creating and processing the Purchase Order

Instructor does the following and then turns over to user to do.

Bid Tab: Summary Tab

Upon opening the Bid, the Basic Purchasing user should navigate to the Summary tab. At the bottom of the Summary Tab, the user will need to select Bid Tab. After selecting the Bid Tab, navigate to the Summary and click Create PO.

- ✓ Select Create PO
- ✓ PO is highlighted in Validation window
- ✓ Click link for the PO

- ✓ Navigate to Bid (Advanced Search or Documents > Bids > Opened)
- ✓ Open Bid and navigate to Summary tab
- ✓ Select **Bid Tab**
- ✓ On the Bid Tab, select the **Summary tab**
- ✓ Select **Create PO (Purchase Order)**
- ✓ The **Purchase Order Creation Preview** screen opens
- ✓ Select **Purchase Order creation options** – leave defaults
- ✓ Open New Purchase Order

General Tab

The Purchase Order will open to the Summary Tab. Click General Tab and work your way through the PO tabs.

The PO document populates with information from the Bid but there are some required fields that were not available that need to be populated on the Purchase Order. The required fields will be displayed in **Red**.

While the PO is an In-Progress status all fields can be edited. The approved Requisition and Bid will stay as-is and can be navigated to from the PO > Items tab for review/audit purposes.

Review and update the General tab. The following are required when processing a PO:

- ✓ **Type code** – Select based on the choice most descriptive of the type of procurement
- ✓ **PO Type** - Select Open Market for one time purchase
- ✓ **Actual Contract Begin Date** – Select date contract begins with the vendor
- ✓ **Actual Contract End Date** – Select date contract ends with the vendor

- ✓ Type Code: A – Competitive Sealed Bidding
- ✓ PO Type: Open Market
- ✓ Actual Contract Begin Date: Today's Date
- ✓ Actual Contract End Date: One Year from Today
- ✓ Renewal Term Units (renewal indicator, ex. Months, years, etc.): Years
- ✓ The following information is required for the AIS/BidBuy integration. Agencies that do not use AIS, will not see these fields in BidBuy.
 - Fiscal Year of Obligation: Current Fiscal Year
 - Transaction Code Prefix (first 2 digits): PO
 - Transaction Code Suffix (last 2 digits): Open Ended (establish only)
 - Skip Transaction (if yes, transaction is NOT sent to AIS): No

<ul style="list-style-type: none"> ✓ Additional fields will be required for agencies that interface to AIS. There will be additional training specific to these fields. 	
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Items Tab

<p>The Items tab was carried over from the Bid. The Basic Purchasing user will review and update as needed.</p> <p>AIS Agencies – there is a custom filed at the bottom of each Item that will need to be populated on the PO.</p> <ul style="list-style-type: none"> ✓ Select the Item Number to edit ✓ Scroll to the bottom of the Items tab > General subtab ✓ Select Fixed/Variable dropdown ✓ Select Save & Exit to return to the list of items 	<ul style="list-style-type: none"> ✓ Select each Item # to review/edit <p>AIS Agencies:</p> <ul style="list-style-type: none"> ✓ Fixed/Variable: Fixed ✓ Save & Exit
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Vendors Tab

<p>Vendor awarded on the Bid Tab displays. The BP user can review and confirm Vendor mailing addresses and PO Terms.</p> <p>The State has selected set terms for the following:</p> <ul style="list-style-type: none"> ✓ Payment Terms = N/A ✓ Freight Terms = Freight Prepaid ✓ Shipping Terms = F.O.B. Destination <p>The following terms are available for Shipping Method:</p> <ul style="list-style-type: none"> ✓ Best Way ✓ Federal Express ✓ United Parcel Service 	<ul style="list-style-type: none"> ✓ No Action, briefly review
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Address Tab

<p>The Ship-to Address and Bill to Address are carried over from the Bid document.</p>	<ul style="list-style-type: none"> ✓ No Action, briefly review
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Accounting Tab

<p>The Account Codes are carried over from the Requisition/Bid to the Purchase Order's Items tab > Accounting subtab. The header level accounting tab will not be populated.</p> <p>Select Items > Accounting to show the class the Account Codes carried over for each Item.</p> <p>AIS Agencies</p> <ul style="list-style-type: none"> ✓ When the Purchase Order is 'Sent' to the vendor, the AIS/BidBuy Financial Interface is triggered and an Obligation created in AIS. 	<ul style="list-style-type: none"> ✓ No Action, briefly explain
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Routing Tab

<p>The routing that a Purchase Order must follow for approval is determined by the applicable approval paths.</p> <p>This tab remains blank until an approval path is determined when the PO is submitted for approval.</p>	<p>✓ No Action, briefly explain</p>
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Attachments Tab

<p>Attaching Files or Forms to BidBuy documents is a useful way to include specifications or other guidelines in the user's procurement documents.</p> <p>After adding an Attachment, the BP user will need to determine whether the following should be selected. The Form to Process list will help inform the selection.</p> <ul style="list-style-type: none"> ✓ Show Vendor ✓ Confidential <p>The checkboxes are intended to be used together. If you select Show to Vendor and Confidential, the Attachment will be displayed to the Vendor but NOT the general public. If you select only Show to Vendor, the attachment is viewable by the Vendor AND the general public.</p>	<p>✓ Add a file from the computer directory (can be a picture) to demonstrate how to add an attachment.</p>
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Notes Tab

<p>The Notes tab allows the user to add notes to provide additional information or special instructions for internal users. A note is similar to a post it note as an internal communication.</p> <p>Only the user creating a note <u>may edit</u> their note.</p>	<p>✓ No Action, briefly review</p>
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Reminders Tab

<p>Reminders are a useful function of the application to send to a specific State user of BidBuy on a specific date.</p> <p>Reminders are sent via email (if option selected) and display on the user's Reminders Tab.</p>	<p>✓ No Action, briefly review</p>
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Summary Tab

<p>The PO Summary Tab allows the user to review the PO for revisions and updates prior to approval.</p> <p>Automatic Approval - approval paths are not configured in BidBuy Train, so user will automatically approve their document.</p> <p>Upon approval, the PO will go to a 'Ready to Send' status. The user then has an option on how to notify the vendor.</p> <p>The following actions are available for vendor notification:</p> <ul style="list-style-type: none"> ✓ Send Email and Notify Vendor <ul style="list-style-type: none"> ○ The vendor will receive an email notifying them a PO is available to retrieve from BidBuy. ○ The Vendor will need to log into BidBuy to review the PO document. ✓ Set to Printed Status <ul style="list-style-type: none"> ○ The vendor will NOT receive an email. ○ The Vendor can still find and review the PO document when logging into BidBuy. <p>The PO must be in a 'Sent' status upon completing the PO.</p>	<ul style="list-style-type: none"> ✓ Submit for Approval ✓ Select Automatic Approval <p>PO is in Ready to Send status</p> <ul style="list-style-type: none"> ✓ Select Send Email and Notify Vendor <p>Save & Continue</p>
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Hands-on Activity

- ✓ Attendees convert the Bid Tab to Purchase Order and process the PO
- ✓ Presenter to have the **Process Purchase Order** slide on the overhead and walk around to assist

Presentation - Small Purchase Review

Review

Review of the BidBuy General Navigation presentation.

- ✓ BidBuy Terminology
- ✓ BidBuy User Roles
 - Department Access
 - Basic Purchasing
- ✓ BidBuy Document Types
 - Requisition
 - Bid
 - Purchase Order



Review

- ✓ Understand and use BidBuy Terminology
- ✓ Understand the procurement workflow within BidBuy
- ✓ Understand and explain user roles
- ✓ Understand and use the BidBuy homepage
- ✓ Understand BidBuy document types
- ✓ Create a Requisition
- ✓ Create a Bid (Publish, Open, Award)
- ✓ Create a Purchase Order and Send

Exercise

A second exercise is handed out to be started in class (time permitting) and finished as practice outside of training. The users can also use the example handed out in class for additional practice outside of training.

- ✓ 17 BidBuy Example General Req to PO
- ✓ 17 BidBuy Example General Req to Bid to PO



Exercise Req > Bid > PO

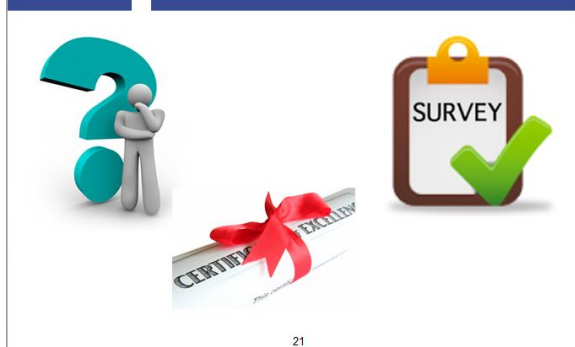
1. Create Open Market Requisition
2. Process Bid
3. Publish Bid
4. Open Bid
 1. Tabulate
 2. Award and Publish
5. Process Purchase Order
6. Send Purchase Order

Closing

Closing – Opportunity for any final comments and ask for questions



Closing



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